

**State of Michigan  
Civil Service Commission**

Capitol Commons Center, P.O. Box 30002  
Lansing, MI 48909

|                                     |
|-------------------------------------|
| <b>Position Code</b><br>1. FINCALTA |
|-------------------------------------|

## POSITION DESCRIPTION

|   |  |
|---|--|
| This position description serves as the official classification document of record for this position. Please complete the information as accurately as you can as the position description is used to determine the proper classification of the position.  |  |
| <b>2. Employee's Name (Last, First, M.I.)</b>   | <b>8. Department/Agency</b><br>LEO-MSF-MEDC  |
| <b>3. Employee Identification Number</b>  | <b>9. Bureau (Institution, Board, or Commission)</b><br>Community Development  |
| <b>4. Civil Service Position Code Description</b><br>Financial Analyst-A  | <b>10. Division</b><br>Community Development Incentives  |
| <b>5. Working Title (What the agency calls the position)</b><br>Incentive Structuring and Program Analyst   | <b>11. Section</b><br>Brownfield/MCRP/SmartZones   |
| <b>6. Name and Position Code Description of Direct Supervisor</b><br>KRAMER, MARY E; STATE ADMINISTRATIVE MANAGER-1   | <b>12. Unit</b>  |
| <b>7. Name and Position Code Description of Second Level Supervisor</b><br>MULLINS, LORI A; STATE DIVISION ADMINISTRATOR  | <b>13. Work Location (City and Address)/Hours of Work</b><br>300 N. Washington Sq. Lansing, MI 48913 / Mon-Fri 8a-5p, or approved alternative schedule |
| <b>14. General Summary of Function/Purpose of Position</b><br>This senior analyst position is responsible for Michigan Community Revitalization Program (MCRP) grant incentives and Brownfield Tax Increment Financing (TIF) incentives. This position serves as the recognized resource for performing needs analysis and financial underwriting of Brownfield Act 381 Tax Increment Financing (TIF) incentives as well as financial underwriting support of Michigan Community Revitalization Program (MCRP) grant incentives. In addition, this position performs statutory reviews for Brownfield Act 381 Work Plans and for MCRP and prepares briefing memos and resolutions for the MSF Board and/or MSF Board Delegates. This senior analyst serves as the recognized resource for project reviews in Regions 6 and 9. |  |

15. Please describe the assigned duties, percent of time spent performing each duty, and what is done to complete each duty.

List the duties from most important to least important. The total percentage of all duties performed must equal 100 percent.

**Duty 1**

**General Summary:**

**Percentage: 50**

Recognized resource for providing complex needs analysis and financial underwriting for Brownfield TIF incentive requests and to ensure that incentives have the ability to move the project forward. In coordination with senior financial analyst, provide financial underwriting support and needs analysis for Michigan Community Revitalization Program (MCRP) grant incentives.

**Individual tasks related to the duty:**

- Manages diverse loan, grant, and other financial incentives within a portfolio; engages in project management of the portfolio; resolves legal and business issues; and monitors portfolio activity.
- Maintains current knowledge of legislation and have ability to interpret statutes as they relate to all incentives.
- Performs in-depth needs and financial analysis for each project to ensure that applicants for incentives have the ability to move the project forward.
- Reviews various programmatic documents to ensure their completeness and compliance with both statutory and policy requirements.
- Prepares and reviews briefing memos for presentation to the MSF Fund Manager, Delegates of the MSF, or Michigan Strategic Fund Board.
- Manage the expectation of real estate developers, lenders, attorneys and other stakeholders during the negotiation process.
- Provide support to the Community Assistance Team and other field staff on real estate development underwriting and financial structuring.
- Prepares for meetings with project stakeholders by preparing materials and meeting invitations; records and distributes meeting notes.
- Reviews, processes and prepares amendment requests for approvals and/or changes to previously approved projects

**Duty 2**

**General Summary:**

**Percentage: 25**

Conduct statutory reviews of Brownfield and MCRP projects. Serve as the recognized resource for project review in assigned region/territory.

**Individual tasks related to the duty:**

- Perform statutory review of Brownfield 381 Work Plans and Michigan Community Revitalization Program applications
- Interpret legislation, policies and guidance and also communicate with stakeholders about relevant applications.
- Reviews various programmatic documents to ensure their completeness and compliance with both statutory and policy requirements.
- Prepares and reviews briefing memos and pre-approval letters for presentation to the MSF Fund Manager, Delegates of the MSF, or Michigan Strategic Fund Board.
- Prepares for meetings with project stakeholders by preparing materials and meeting invitations; records and distributes meeting notes.
- Analyze and interpret project data received from community and/or developer. Thoroughly analyze project materials and make recommendations to leadership on whether or not state support should be awarded.
- Reviews, processes and prepares amendment requests for approvals and/or changes to previously approved projects.
- Serves as the expert for Brownfield and MCRP projects within regions 6 and 9.

**Duty 3**

**General Summary:**

**Percentage: 10**

Support community assistance team and other field staff in scoping and vetting early-stage projects.

**Individual tasks related to the duty:**

- Communicate about program guidance and parameters as they relate to specific projects that are in Salesforce Stage 0 or earlier
- Conducts technical assistance visits and calls with companies and local units of government to review procedures for obtaining incentives.
- Prepares for meetings with project stakeholders by preparing materials and meeting invitations; records and distributes meeting notes.

**Duty 4**

**General Summary:**

**Percentage: 10**

Review, interpret and assist in the development of legal documents related to program approvals.

**Individual tasks related to the duty:**

- Coordinate with MEDC legal team in the drafting of legal agreements following MCRP approvals.
- Manage the expectation of real estate developers, lenders, attorneys and other stakeholders during the closing process.

**Duty 5**

Perform other duties as assigned.

Individual tasks related to the duty:

Perform other duties as directed by management.

16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.

Conduct financial review of projects requesting the use of state Brownfield Tax Increment Financing and Michigan Community Revitalization awards. Evaluate project proformas and request supporting materials, as needed. Interpret, review and determine completeness of brownfield work plans including analysis of tax increment financing spreadsheets. Interpret, review and determine completeness of Michigan Community Revitalization Program applications and other intake materials including analysis of project proformas. Evaluate data for accuracy. Independently determine work priorities. As a senior level employee, independently makes day to day decisions and determines work priorities without management assistance.

17. Describe the types of decisions that require the supervisor's review.

Recommendations for Board or Delegate approval, final grant structuring terms, and recommendations for amendments to existing award Agreements.

18. What kind of physical effort is used to perform this job? What environmental conditions in this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.

While performing the duties of this job, the employee is regularly required to sit, use hands to finger, handle, or feel; talk and hear. The employee is occasionally required to stand; walk; reach with hands and arms. The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision, and ability to adjust focus, especially due to concentration on a computer screen and small numbers.

The job requires occasional travel throughout the State of Michigan, including the Upper Peninsula.

19. List the names and position code descriptions of each classified employee whom this position immediately supervises or oversees on a full-time, on-going basis.

Additional Subordinates

20. This position's responsibilities for the above-listed employees includes the following (check as many as apply):

- |   |  |
|---|--|
| <input type="checkbox"/> Complete and sign service ratings. | <input type="checkbox"/> Assign work.                      |
| <input type="checkbox"/> Provide formal written counseling. | <input type="checkbox"/> Approve work.                     |
| <input type="checkbox"/> Approve leave requests.            | <input type="checkbox"/> Review work.                      |
| <input type="checkbox"/> Approve time and attendance.       | <input type="checkbox"/> Provide guidance on work methods. |
| <input type="checkbox"/> Orally reprimand.                  | <input type="checkbox"/> Train employees in the work.      |

22. Do you agree with the responses for items 1 through 20? If not, which items do you disagree with and why?

Yes.

23. What are the essential functions of this position?

This position is responsible for financial underwriting and needs analysis of Brownfield TIF and MCRP incentives, statutory review and project communication.

24. Indicate specifically how the position's duties and responsibilities have changed since the position was last reviewed.

New position.

25. What is the function of the work area and how does this position fit into that function?

The Community Development Incentives Section is responsible for and administers programs that provide financial incentive packages to real estate investors for the redevelopment of brownfield and historic properties within Michigan's urban and downtown areas. This section is responsible for the monitoring, reporting, and compliance of the MCRP grants and loans, brownfield tax increment financing tools and the monitoring, reporting, and compliance with the SmartZone agreements and legislation. Also provides technical assistance and training to new and existing staff members regarding various packaging options.

This position will review projects to evaluate their financial need and overall viability in accordance with Act 381 of 1996, as amended and with the requirements and guidelines of the Michigan Community Revitalization program and upon successful project evaluation, the position shares responsibility for preparation of memos and resolutions necessary to seek Michigan Strategic Fund Board approval.

**26. What are the minimum education and experience qualifications needed to perform the essential functions of this position.**

**EDUCATION:**

Possession of a bachelor's degree in any major with at least 24 semester (36 term) credits in one or a combination of the following: accounting, finance, or economics.

**EXPERIENCE:**

**Financial Analyst 12**

Three years of professional experience providing a systematic review, analysis, interpretation, and/or evaluation of budgets, mortgages, loans, or other financial data, equivalent to a Financial Analyst, including one year equivalent to a Financial Analyst P11, Accountant P11, or Auditor P11.

Prefer at least two years of experience in program/project underwriting and knowledge of contracts and property law, experience administering similar community development grant programs, business development grant programs and/or loan programs.

**KNOWLEDGE, SKILLS, AND ABILITIES:**

1. Ability to read, analyze, and interpret technical journals, legal and contractual documents, and financial reports.
2. Ability to function with strong written and verbal communication skills.
3. Ability to write reports, business correspondence and procedure manuals.
4. Ability to effectively present information and respond to questions from groups of managers, clients, customers and the general public.
5. Ability to define problems, collect data, establish facts and draw valid conclusions.
6. Ability to interpret an extensive variety of technical instructions and deal with several abstract and concrete variables.
7. Ability to grasp the industry/position-specific software with minimal training.

**CERTIFICATES, LICENSES, REGISTRATIONS:**

None required. Applicants with National Development Council (NDC) or International Economic Development Council (CEdC) certification preferred.

**NOTE: Civil Service approval does not constitute agreement with or acceptance of the desired qualifications of this position.**

***I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.***

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

**TO BE FILLED OUT BY APPOINTING AUTHORITY**

Indicate any exceptions or additions to the statements of employee or supervisors.

None.

***I certify that the entries on these pages are accurate and complete.***

MARKIE JUSTICE

9/23/2021

Appointing Authority

Date

***I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.***

Employee

Date